

Situation Report | Natural Hazard

August 6, 11:00 CET

Typhoon Dolphin

How it compares to other events this season, and what is actually confirmed.



Status: WATCH

East China landfall window 8 to 10 August: [C] confirmed by named source, [M] Prewave estimate, [A] assumption

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● 1 Summary

193 Marine projects halted Zhejiang, 5 Aug 20:00	4.4–8 d Shanghai berth delay SEKO, 5 Aug 12:00 HKT	66 Mt+ Bulk discharge, Wks 32–33 AXSMarine, 30 Jul	Wk 32–34 Recovery window SEKO, 5 Aug 12:00 HKT
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Typhoon Dolphin is the thirteenth named storm of the western Pacific season and, at its peak, the strongest on record to form that close to the International Date Line.

It crossed the Ogasawara islands on 4 August and is forecast to make landfall on Okinawa on 7 August before moving into the East China Sea. From there, every major forecast source now points it at the coast of Zhejiang between 8 and 10 August.

That is the part that matters. Dolphin is not arriving at a functioning network. It is arriving at one that has absorbed two typhoons in four weeks and is not scheduled to recover until late August. This report sets out what is confirmed, what four past East China storms tell us to expect, and what to do about it now.

VERDICT: WORTH FLAGGING, ON COMPOUNDING-CONGESTION GROUNDS, NOT ON DOLPHIN'S OWN DAMAGE.

No structural damage to any port, terminal, plant or fab is confirmed anywhere on the track, and no production or output loss has been disclosed at any facility [A, absence of reporting, not confirmed absence of impact].

Okinawa itself is not the exposure: no OEM assembly, no significant industrial base [M]. What matters is that every major forecast source now puts the storm on the coast of Zhejiang, four weeks after Typhoon Bavi hit the same coastline and left a queue that will not clear until late August.

● 2 Confirmed as of 6 August

● Track

The eye, roughly 28 km wide, passed directly over North Iwo To (Ogasawara) on 4 Aug [C, The Watchers]. Landfall forecast on Okinawa (pop. 1.4 m) 7 Aug, via the Daito and Amami islands 6 Aug [C, Al Jazeera]. Peak was 165 mph / 910 hPa, the strongest typhoon on record to develop that close to the International Date Line [C, Yale Climate Connections, Jul 2026].

It reintensified to Category 4 equivalent on 4 Aug after a fourth eyewall replacement cycle, with 215 km/h sustained winds and 16 m waves [C, The Watchers]. Current JTWC-derived guidance has it holding 150–155 km/h for about two days, then weakening rapidly in the East China Sea on shear and upwelling [C, Zoom Earth, 6 Aug].

SEKO's 5 Aug bulletin still designates it a Super Typhoon at force 16; the sources conflict. Two further systems are active: Tropical Storm Kujira formed west of Luzon at 02:00 on 5 Aug and is forecast to be absorbed by Dolphin, and Typhoon Chanhom formed that afternoon [C, Focus Taiwan; news.china.com].

● Aviation

China Airlines and Starlux have cancelled or rescheduled Taoyuan, Taichung and Kaohsiung services to Naha across 6 to 8 Aug [C, Taipei Times, 5–6 Aug]. Hong Kong Airlines has cancelled four Okinawa flights; HK Express has adjusted Okinawa and Ishigaki services [C, The Standard, Aug 2026].

Minamidaito Airport is closed all day on 6 Aug [C, Japan Airlines]. At Naha, crosswinds are forecast at 55 kt average with gusts to 83 kt between 00:00 and 12:00 UTC on 7 Aug, enough to seriously disrupt RWY 18/36 [C, Weathernews, 5 Aug]. Taiwan's CWA had issued no sea warning as of the morning of 6 Aug, flagging one as possible from Friday afternoon, with a land warning to follow if the circulation closes on Lienchiang County [C, Focus Taiwan; bne IntelliNews].

● China's pre-emptive measures

Zhejiang's provincial command activated its marine typhoon emergency response at 18:00 on 5 Aug; the Zhejiang MSA escalated to a Level III coastal response at 20:00, up from Level IV on 3 Aug. By 20:00 on 5 Aug, all 193 marine engineering projects in the province had stopped, 474 construction vessels had moved to shelter, and more than 10,000 people had been evacuated from outlying islands [C, 163.com; China News Service]. Zhoushan and Shengsi passenger routes suspend from the afternoon of 6 Aug. Shanghai, Zhejiang and Fujian have all activated typhoon responses. Ningbo terminals have begun anti-typhoon lashing and empty container securing, and Maersk is diverting Shanghai-bound services toward Xiamen and Hong Kong [C, SEKO, 5 Aug].

● The baseline it is arriving into

All six primary Chinese gateways remain designated Heavily Disrupted after Noul and Bavi. Shanghai berth delays average 4.4–8 days (WGQ2 7–8 d, WGQ5 5 d, YGS4 ~8 d; non-alliance long-haul 144+ hrs) with yard saturation at 75–90%, despite a single-day record of 203,881 TEU on 1 Aug.

Ningbo runs 2–3 days with Meishan yard density near 90%; Qingdao 3–4 days, with QQCTU dredging removing a berth from 1 Aug for 2–3 weeks; Yantian 3–5 days under ETB-7 and a 9,000 TEU daily quota; Shekou 3–4 days under ETB-7 and a 120% intake cap.

Spillover has reached Busan (BNCT yard ~98%), Singapore and Manila. Recovery is projected through Weeks 32–34 [C, SEKO Logistics, 5 Aug 12:00 HKT]. More than 66 Mt of iron ore, coal, bauxite, soybeans and nickel ore are due for discharge at Chinese ports in Weeks 32–33 [C, AXSMarine, 30 Jul].

● How it compares: this season, and past East China events

EVENT	DATE	TRACK	VERIFIED OPERATIONAL OUTCOME	RELEVANCE TO DOLPHIN
Bavi	11–12 Jul 2026	Yuhuan, Zhejiang [C, SCMP, 12 Jul]	Ningbo suspended pickup and gate-in from noon 10 Jul; Shanghai paused Yangshan and Waigaoqiao. Shanghai resumed 08:00 on 13 Jul, Ningbo progressively that afternoon [C, SEKO; Sourcing Journal]. Shanghai waiting ran 72–144 h afterwards [C, NVO Worldwide; Tradlinx]. Linerlytica put over 2m TEU waiting in North Asia	HIGH: same corridor Dolphin is now forecast to hit; its backlog is the baseline Dolphin would land on
Noul	24–27 Jul 2026	South China	Closures of 31–71 h across five terminals [VERIFY: two figures in circulation]; ETB-7 controls and appointment quotas still in force [C, SEKO; Kuehne+Nagel]	Moderate: consumed spare capacity, but South China is outside Dolphin's likely footprint
Muifa	Sep 2022	Zhoushan, Hangzhou Bay, then Shanghai, 14 Sep	Strongest storm to reach the Yangtze River Delta since Damrey 2012. Operations suspended at Ningbo and Shanghai; oil and gas halted at Zhoushan; LNG import terminals at Ningbo, Zhoushan and in Jiangsu shut. Nearly 7,400 commercial vessels sheltered in Zhejiang; 1.3m relocated from Zhoushan; 589 flights cancelled at Shanghai's two airports, 380+ trains suspended [C, NASA Earth Observatory; CNN, 13 Sep 2022]	HIGH: closest precedent for a full dual-port suspension, and the only one showing energy infrastructure impact alongside containers

EVENT	DATE	TRACK	VERIFIED OPERATIONAL OUTCOME	RELEVANCE TO DOLPHIN
Bebinca	Sep 2024	Shanghai, landfall 07:30, 16 Sep	Strongest typhoon to hit Shanghai since 1949; 414,000+ moved to safety. Ningbo halted container operations Saturday, Yangshan and Waigang from midnight Sunday. Shanghai port calls fell 56% Fri to Sat, then 95% into Sunday; Ningbo-Zhoushan fell 86%, to zero on Sunday. Hapag-Lloyd recorded pre-storm waits of 36–60 h at Shanghai and 24–48 h at Ningbo; bunching delays were forecast to run over a week [C, Sourcing Journal; The Loadstar; CNN, 16 Sep 2024]	HIGH: the closest analogue for a storm landing on an existing queue, and the ceiling case for a direct Shanghai hit
Chanthu	Sep 2021	Stalled offshore Shanghai; never crossed the coast there	Ningbo suspended from noon Sunday; Yangshan, Waigaoqiao and Wusong closed truck gates Monday morning; Zhoushan closed from Saturday. Shanghai resumed container activity 19:00 Tuesday, Ningbo Meidong 17:00 Tuesday, Zhoushan still shut that afternoon. 2,377 flights cancelled Monday, 1,174 Tuesday. Ningbo had only just cleared weeks of congestion from In-Fa and a COVID terminal closure [C, Maritime Executive; gCaptain/Bloomberg; SCMP; Al Jazeera, Sep 2021]	HIGH: the recovery-timing benchmark, the direct precedent for a stall without landfall, and a second case of a storm arriving on a degraded network

● What the comparison tells you

The four East China precedents above resolved as two-to-three-day closures followed by days or weeks of congestion, **not** as structural damage, and Dolphin standalone would sit inside that pattern. Three sources now converge on one coastline with a two-day timing spread [C]:

China's meteorological authorities give landfall on the Zhejiang coast between the night of 9 Aug and the morning of 10 Aug at force 12–14; JTWC guidance gives a second landfall in central Zhejiang after Okinawa; SEKO gives either a Yangtze-Delta-to-Fujian landfall on 8–9 Aug or a northward coastal brush toward Shandong on 10–11 Aug.

The residual question is whether it lands or loiters, and Chanthu shows a stall is no reprieve: it never crossed the coast at Shanghai and the terminals shut anyway. The non-obvious risk is arithmetic, not meteorological.

Two of these storms arrived on networks that were already degraded, which is precisely Dolphin's situation. Chanthu hit a Ningbo that had only just cleared In-Fa and COVID congestion. Bebinca landed on a Shanghai already carrying 36–60 hours of vessel waiting, and the resulting bunching was forecast to run beyond a week. Dolphin would arrive on a Shanghai carrying 4.4 to 8 days, roughly three times Bebinca's starting queue, with Weeks 32–34 of recovery still to run and Chanhom forming behind it. These comparables bound the closure duration well.

They do not bound the recovery tail, because none of them arrived on a queue this size.

- **3 Likely impact, and what to do**

- **Lead times [M].**

No delta under current conditions. Landfall base case: a 2–3 day closure, consistent across all four East China precedents, plus 2–4 days of post-reopening bunching = **+4 to 7 days** on East China ocean flows, on top of the 4.4–8 day Shanghai queue rather than instead of it; **+8 to 11 days** adverse, on the Bebinca pattern where bunching alone ran beyond a week from a far smaller starting queue.

Loiter branch: **+3 to 6 days** on the Chanthu precedent, where ports closed for a comparable period without a landfall and reopened terminal by terminal rather than together. The loiter branch also pushes cargo toward Qingdao, which has just lost a berth to dredging until mid-August. Air is a thinner release valve than usual, with ex-China spot rates already trending up [C, SEKO].

- **Automotive: an open item, not a clear finding [M].**

The likely footprint runs across the coastal Zhejiang and greater Ningbo corridor, which carries real OEM and component-base exposure and cannot be characterised either way without a facility-level screen.

- **Bulk, energy and electronics.**

The 66 Mt of Weeks 32–33 dry bulk [C] overlaps both branches. Bauxite and alumina buyers should keep this discharge-timing risk separate from the Guinea supply question, which is slower and larger: Guinea shipped 183 Mt in 2025, up 25% year on year, with prices roughly halved from their early-2025 peak, and Mines Minister Bouna Sylla told Bloomberg in late May that export controls would be set out in June, with reporting pointing to a ceiling near 150 Mt.

That timeline had previously been signalled for April and no source reviewed confirms the measures are in force. China imported 201 Mt of bauxite in 2025, roughly three-quarters Guinean [C, Bloomberg, 25 May 2026; mining.com; Miningmx]. Muifa's precedent shows LNG terminals shutting alongside container terminals, so energy buyers should not read this as container-only. Northern and eastern Taiwan face outer-rainband rain and wind; Bavi's July precedent there produced a three-day delay to one foundry's revenue disclosure and no disclosed output impact [C, BigGo Finance, Jul 2026], the base case.

- **Confidence.**

High on the track to Okinawa, the flight and airport disruption, and the Zhejiang pre-emptive measures (named sources, 4–6 Aug). High on the degraded port-network state: SEKO's data carries an explicit 5 Aug 12:00 HKT timestamp with terminal-level granularity. High on the precedent set: all four East China comparables are sourced to contemporaneous reporting with named operators and verified reopening sequences, not pre-storm plans.

Medium on the East China landfall: three sources converge on Zhejiang, but timing spreads across 8–10 Aug and no source assigns a probability to landfall against loiter, so treating landfall as likelier follows provincial forecasters' own framing [A].

Low on intensity at landfall, where sources actively conflict; the gap between a force 16 system and one weakening rapidly under shear is the difference between the base and adverse cases.

- **Methodology.**

The compounding argument is a timing overlay comparing two independently sourced timelines (projected Noul and Bavi recovery through Weeks 32–34 against the 8–10 Aug landfall window), not a joint probabilistic estimate.

- **Limitations.**

Not independently confirmed: structural damage anywhere on the track; production or capacity loss at any facility; Ryukyu and Amami ferry status; Naha port status; carrier blank-sailing notices specific to Dolphin, as distinct from the Maersk diversions already in force. No casualty figures published for this event. The 66 Mt figure rests on a single provider. The status of Guinea's export controls is unresolved: announced as forthcoming, repeatedly deferred, not confirmed in force. Automotive exposure across coastal Zhejiang is an open screening task, not a finding. Chanhom's track is not forecast in any source reviewed, so its contribution to the recovery tail is unquantified. Both branches may be revised as the system enters the East China Sea on 7–8 Aug.

● Sources

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